

## DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 860 - 4866 - 901	
DIVISION/UNIT Retirement Readiness / Division Support Programs	CLASS TITLE Pension Program Manager III	
INCUMBENT NAME VACANT	WORKING TITLE Division Support Program Manager	
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
<p>The Retirement Readiness Division (RR) is the principal area of the organization that develops, delivers, and coordinates educational services to CalSTRS members, employers, and staff. The goal of the RR is to ensure that all members receive adequate, timely, and accurate information to make sound decisions regarding their CalSTRS benefits.</p> <p>Under general direction of the Retirement Readiness Director (CEA C), the Pension Program Manager III, (PPM III) oversees the Retirement Readiness Division Support teams; Systems, Solutions, Strategic Development, and Program Development, Quality Management and Training Services units as well as integrating with CalSTRS Defined Contribution Programs. The incumbent will manage PPM II's and indirectly oversee the Divisions support team areas. The incumbent will formulate and direct policies for current and future Retirement Readiness education, benefit planning, business practices, stakeholder engagement, and organizational project work. The PPM III is expected to display a high degree of initiative, with a broad understanding of both the defined benefit and contribution programs administered by CalSTRS, as well as maintain an extensive knowledge of retirement program administration required to create and support an innovative work environment, while performing the following duties.</p> <p>This position will require up to 20% of travel.</p>		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
30%	<b>ESSENTIAL FUNCTIONS</b> Work as a member of the Retirement Readiness Senior Leadership team to effectively formulate departmental policies. Develop and maintain Operational Risk Management policies for all programs. Oversee and encourage the collaboration between other CalSTRS Division Senior Leaders and subject matter experts (SMEs) to ensure that resulting educational materials are correct, consistent, complete, and in keeping with the existing Teachers' Retirement Law.  Mentor and develop the subordinate managers and staff. Balance workloads, determining when to seek assistance from other RR Units and CalSTRS Business areas to collaborate on a given project. Monitor, evaluate, and coach employee performance. Address personnel matters, including performance management and ensure adherence to CalSTRS' Human Resources policies. Oversee employee security and safety.	
25%	Oversee and provide guidance to the PPM II's for Program, Quality & Training Manager and the Systems, Solutions and Strategic Manager for the development and delivery of the support programs, processes and procedures, internal controls, and risk management protocols. Oversee and provide leadership and guidance to identify and develop consistent methods to evaluate benefits planning, support and scheduling staff working in contract offices, Headquarters, and state-operated Member Service Centers, Pension Solution project, System operations and the Division Strategic goals and objectives.  Provide policy advice and recommendations to the Director and RR senior leaders and interact	

25%	with managers and directors to gain continuity in business processes, in alignment with both the Defined Benefit and Defined Contribution programs. Establish long range goals to continue growth and improvement of the programs and benefits offered to members and district offices. Provide suggestions on improvement and share information to assist in the implementation of the customer service performance review methodology used to outline performance measures and strategies to meet the department's goals and objectives. Manage all resources effectively to ensure effective DB program deliverables and overall production goals of the division/unit are met. Represent Retirement Readiness on enterprise-wide projects, process improvements, and branch related activities.
15%	Directs the division change management efforts related to Pension Solution, member services, employer, and stakeholder engagement. Serves as backup to the RR Director on the Pension Solution Steering Committee. Represents RR Benefits and Services branch on the implementation of Continuous Change Management recommendations. Confers with all levels of staff including directors, managers, supervisors, analysts, program representatives, and contract staff in the various CalSTRS' units to resolve change management issues, training and problems crossing organizational lines.
5%	<b>MARGINAL FUNCTIONS</b> Speak at conferences, hold workshops, and present information to a variety of client groups such as: members, employers, CalSTRS' staff, and stakeholders to effectively promote market and provide services.

## COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies:

- Decision Making
- Ethics and Integrity
- Fostering Diversity
- Mentoring
- Professional Confidence
- Results Orientation
- Risk Management
- Strategic Thinking and Implementation

## CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Ability to support and model CalSTRS Core Values

## WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of sitting.
- Office setting with low partitions. Very open floor plan.
- Work in a high-rise building, in an open space environment.
- Ability to use a computer keyboard and mouse several hours a day.
- Move up to 25 pounds.

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- Read from computer screens several hours a day.
- Talk on the telephone for extended periods using a headset.
- Ability to travel.
- Ability to stand for long periods of time to deliver presentations.

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

### To be reviewed and signed by the supervisor and employee:

#### SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

#### EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED